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ABSTRACT

This overview of the current status of teacher incentive programs includes information on: (1) support for the programs and leadership for program development; (2) funding patterns; (3) evaluations of specific programs; (4) program objectives and participant attitudes; and (5) committment to program development. Brief summaries are presented of the status of career ladder, incentive, and mentor teacher programs in each state. State contacts are listed. (JD)

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More Pay for Teachers and Administrators Who Do More: Incentive Pay Programs, 1987

Lynn M. Cornett

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Southern Regional Education Board
CAREER LADDER CLEARINGHOUSE

December 1987

More Pay for Teachers and Administrators Who Do More: Incentive Pay Programs, 1987

Are career ladder programs working? Where is the "best" incentive program for teachers? The answers to these questions will vary depending on whether you ask a legislator in a state with funding problems, a teacher who is earning an additional $7,000 because of a career ladder program, the president of a teachers' organization opposing a particular incentive program, or an enthusiastic school principal who supports a district or state plan.

One fact is clear. Career ladder and other incentive pay programs are the largest educational experiment in the United States today. Hundreds of millions of dollars are being spent, and hundreds of thousands of teachers and school administrators are part of state and local incentive programs to reward teachers and administrators for doing a better job or for taking on additional responsibilities in schools. Leadership, teacher support, funding, and evaluating programs for outcomes and effectiveness continue to be key points for discussion.

The fact that teachers say they *really like* or they *really dislike* the programs may signal change beginning to take place in schools. A report of preliminary findings from a comprehensive outside evaluation of Utah's Career Ladder System (now in its fourth year) states:

> "Teachers and principals have very strong feelings about Career Ladders. They either love [the idea] or they hate it. Our interpretation is that ... it is a major reform which is affecting the climate of the schools in a powerful way ... changing both the instructional and management processes in the schools."

A similar phenomenon is seen in North Carolina's Charlotte-Mecklenburg program. There, the superintendent claimed he receives five letters a day from teachers who threaten to quit because of the career development program, but at the same time he said, "Many teachers continue to say it's outstanding, and the single-most important contribution to their professional development."

There is an important message in the Utah consultant evaluation and the Charlotte-Mecklenburg superintendent's observation—career ladders deal with fundamental changes. Fundamental changes in any situation—in business, in government, or in the schools—make for strong reactions. These strong reactions should not be seen by educational and governmental leaders as a sign of a fatal flaw in incentive programs. Perhaps to the contrary. If there were no strong reactions to an incentive program as it was implemented, that would signal that the program was bringing about no real change and was dealing with important issues only at the surface. States and school districts should weigh negative reactions and suggestions for modifications in their plans that may spring from this dissatisfaction.

In some states career ladders may be as controversial today as in 1984 when legislation made Tennessee the first state to establish a statewide program. But, in 1987, no state backed away from a career ladder program that was underway. Iowa has just provided over $92 million in new money for teachers—$43 million will go to districts that develop incentive programs. In states such as Texas and Utah, where cuts in education were made, funding for career ladder programs was not reduced in 1987. Pilot projects in North Carolina and South Carolina continue to expand. Some states—Arkansas, Florida, Idaho, Louisiana, and New Mexico, for example—that have not

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yet provided state funding continue with just plans. Indiana reduced funding for its teacher quality program. Legislative sessions in 1988 will determine the future of many programs. The Alabama legislature will decide whether to fund the career ladder (initial funding went to develop the evaluation process). Prospects for full funding of the career ladder appear dim. Kentucky and Virginia funded one- and two-year pilot projects but have not committed beyond that.

Leadership and Support

"How much time is needed to develop consensus as well as workable programs?"

Career Ladder Clearinghouse, July 1985

"... the public must support these changes for several years if it expects to see real changes."

Jay Robinson, Former Superintendent,
Charlotte-Mecklenburg School District, March 1986

How much time does it take to develop support or consensus for a program? How much time does it take to determine if a plan is working or achieving its intended goals? The answer is *more* time. That answer is based on the results of three or four years of experience with these new career ladder and incentive programs. The more important question is: Will leadership and support be sustained long enough for a fair test to determine if the programs are meeting their intended goals?

Initial support came from state boards of education, governors, legislators, and the public. Less enthusiastic voices were heard from many educators—teachers' organizations, in particular. Leadership for educational reform was centered in state capitals. That leadership is necessary but not sufficient. Principals, teachers, and parents must be part of change if it is to be fundamental, lasting change. Many governors and legislators who promoted reform are no longer in office. Newly-elected officials have their own agendas and may not have the same vision of reform as their predecessors.

Leadership at the district level is taking different forms. In Fairfax County, Virginia, the superintendent and board of education proposed and put into place a new incentive program for teachers. The new school superintendent in the Charlotte-Mecklenburg, North Carolina, school district (a district that had one of the first career development plans) supports the continuance of the program and has appointed an advisory committee to make recommendations on changes needed to refine that district's program. Consultants evaluating the South Carolina Teacher Incentive Program found that superintendents and local boards generally support that state's programs. The recent report on Kentucky's Career Ladder Pilot Program noted that local district leadership was the determining factor in whether or not teachers were used effectively under extended employment plans.

Local chapters of the American Federation of Teachers, such as those in Toledo, Ohio, and Rochester, New York, have taken the initiative in working with local school districts to develop career development programs. In other state programs, such as those in California, Iowa, and Wisconsin, the locally-designed programs must be joint efforts involving the teachers' organization. In Alabama, the Alabama Education Association, which by law is involved in the designing of the program, has been supportive of the implementation of the evaluation process that was the first phase of a proposed career ladder program.

General support from state teachers' organizations has varied. In locally-negotiated career ladder plans, the emphasis is on extra pay for extra duties or different duties, as opposed to other plans that provide bonuses for teachers who demonstrate a higher level of performance within an existing teaching position. (The review of the South Carolina program found that teachers preferred incentives based on performance over assuming extra duties, leading to change in that program.) In Utah, extended employment (all teachers working extra days, etc.) can take 50 percent of the funding. It currently accounts for only 40 percent —less than when the program was initiated several years ago; 60 percent goes to performance bonuses and steps on the ladder. (These decisions in the Utah program are made at the district level.)

Funding

"Incentive programs are expensive . . . funding over the long term must be assured."

Career Ladder Clearinghouse, July 1985

Funding patterns for 1987-88 generally remained at about the same level as for the previous year. Full funding of a statewide program continues in Tennessee and Texas. Tennessee is spending nearly $100 million in 1987-88; Texas, second only to California in number of classroom teachers, has budgeted several hundred million dollars. Some states—Arizona, California, North Carolina, and South Carolina—continue to increase funding to allow expansion to additional teachers. North Carolina is at $16 million, up from $12 million; the South Carolina Teacher Incentive Program went from $6 million to $11.9 million (school incentive program funding is now at $4 million—down from $6 million—and funding for the Principal Incentive Program increased from $700,000 to $1 million). Money for the California Mentor Teacher Program continues to increase—from $30.8 million in 1984-85 to $49.75 million in 1987-88. In Missouri, career ladder funding increased to $8.0 million from $2.6 million a year ago; Arizona's plan is now at $8.8 million compared to $4 million in 1986-87. Funding remained the same in Utah ($41 million) despite other funding cuts for education. Iowa has just put $92 million new dollars into recruiting and retaining quality teachers; $43 million will go to districts for incentive programs.

Kentucky and Virginia funded one- and two-year pilot projects, but it does not appear likely that state funding will be provided for additional programs. States that have not committed funds—Arkansas, Idaho, Louisiana, and New Mexico—have the same budget problems as a year ago and probably will not fund new programs. Funding for the Florida Career Achievement Program has not been forthcoming. (According to the law, $90 million must be appropriated by the end of the 1988 legislative session or the program will be repealed.) Indiana funded its teacher quality pilot programs at $6 million for 1985-87 and provided $4 million for disseminating information and providing training and support to districts implementing plans in 1987-89.

Career ladder plans require substantial funding, especially as higher levels on the ladder are phased in. Long-term commitment of money will be necessary. Incentive programs have tended to be controversial and, therefore, one of the first items to be suggested for budget cuts. Thus far, however, where programs are underway they have not usually been subject to budget reductions. Legislative sessions in 1988 will signal states' intentions for continuing or expanding programs.

Evaluation

"The success or failure of the career ladder concept may rest in fair selection systems that do not evolve into expensive bureaucratic procedures at the state and local level."

Career Ladder Clearinghouse, July 1985

"The more difficult task—and one that is essential for successful performance-based career plans—is the development of an evaluation system that is fair and is perceived as fair."

Career Ladder Clearinghouse, March 1985

A South Carolina study found that 60 percent of the teachers not involved in its Teacher Incentive Program perceive themselves to be in the top 20 percent of teachers in their districts. Therefore it should not be surprising that implementing any evaluation system which is designed to determine excellence will be perceived as not fair by a large number of teachers.

Teachers may accept the bell-shaped curve for students, but many apparently do not accept it for themselves. That there are many good teachers and fewer who are incompetent or excellent is not a concept accepted by teachers, according to what many teachers are saying. Teachers also say they dislike competition for awards (competition leads to teachers being labeled as "good" or "excellent"). In the same South Carolina study, teachers noted competition as a major reason for not participating in the program. A report of a project at Appalachian State University in North Carolina to define the role of master teachers and discuss their preparation and evaluation stated

that, "implementing a master-teacher program requires a commitment to the reality that differences exist in life, that they are recognized and rewarded differently.... The prevailing mind-set must shift from seeing the problems of master-teacher delineation to seeing the possibilities..."

There is no question that teacher evaluation is changing—peer review, classroom observations, and use of student achievement are replacing ratings by principals. Questions still remain. Will statewide procedures work? What are the problems in implementing evaluation equitably across several districts? Will district-designed procedures satisfy those supporting state funding for programs?

While early career ladder and incentive programs were to a large degree centralized at the state level, states establishing more recent programs are using more local involvement and control. However, where districts were originally given free reign in designing evaluation procedures, more structure is now evident. Districts in many of those states are asking for more technical help in developing evaluation procedures. States and districts are refining procedures as programs move into the second or third years. No ideal teacher evaluation model has evolved, nor is a single one likely, but practice is providing directions for change.

In South Carolina, the third-party evaluation revealed that teachers (both those who applied for the program and those who did not) agreed that student achievement, administrator evaluations, and performance evaluations should be used equally to decide on bonuses for superior performance and productivity. Working additional hours, attendance, and self-improvement were said to be less important, according to the survey. This year's program changes the weighting of bonus points to more clearly reflect performance. (Now, 40 of the 50 bonus points are awarded for performance evaluation and documented student achievement.) In addition, the South Carolina incentive model, which depended heavily on assuming work and extra duties and/or activities outside the classroom, is being phased out. Based on site visits of these programs, which depend on district-designed evaluation procedures, consultants noted that the process for observing performance was weak and that technical assistance was needed to train observers and develop evaluation procedures. Districts also needed help in managing and implementing their plans. During 1986-87, the South Carolina Department of Education and the University of South Carolina developed a manual for districts. The manual, "Teacher Performance Evaluation," outlines how to plan and develop an evaluation process, with guidelines on how to collect data and monitor the evaluation procedures.

The North Carolina Career Development Program has completed two years of a four-year pilot project. A study of the implementation of the statewide evaluation system shows that there is wide variation across districts in terms of numbers of teachers who have been placed on career levels I and II—in one district, 49 percent of the teachers were placed on level II; in another district, 84 percent. A common understanding of the criteria and their value may not exist statewide or differences may be real across districts, according to studies by the State Department of Education. Preliminary data indicate that errors are made in rating teacher performance. The data show that evaluators are not consistent in assessing criteria that are not easily observable in the classroom. Lesson planning, interactions with colleagues and parents, and non-instructional school and district duties tend to receive higher ratings than ones that are drawn from "research" and can be observed in the classroom. The conclusion is that when less direct evidence is available, teachers tend to receive higher ratings. More training on these competencies and the rating of them has been mandated. The overall conclusions by the State Department of Education after two years of the project are that the total system is working, and the hard work of superintendents, principals, teachers, and evaluators has been critical in the success of the program.

The evaluation procedures for the Alabama Career Incentive Program have been developed and will be implemented statewide during 1987-88. This program features a teacher performance evaluation that relies on administrators observing teachers in the classroom. A recent independent study reported by the State Department of Education shows that the Alabama evaluation program has approval of over 75 percent of the participants. The immediate effects are seen as the establishment of a consistent statewide vocabulary on classroom behavior and instructional goals and the fact that principals now regularly visit classrooms. (In the past, 50 percent of the state's principals supervised teachers without any formal methods.) According to program consultants, in Alabama, teachers have probably played a larger role in developing the statewide system than in any other state.

The Texas Teacher Appraisal System was implemented during 1986-87 to place teachers on the career ladder. (Local evaluations developed by individual districts were used the first two years.) Approximately 13,000 administrators and teachers were trained as appraisers in the summer of 1986. Proficiency checks and additional training were given in 1987. During 1986-87, an advisory group for the State Board of Education and a committee appointed by the governor recommended revisions in the appraisal process. Some items were combined, others eliminated, scoring was changed, and teacher self-appraisal and professional development plans were simplified. The 1987 legislature reduced the number of annual observations from four to two for teachers at Career Level II or higher who have received performance scores exceeding expectations. Grade chairpersons are now allowed to observe teachers in their own school. (The original law did not allow teachers to be appraised by a teacher in the same building.) In Tennessee, career ladder teachers initially received certification for five years; that has now been extended to ten.

Findings from the 1986-87 Kentucky pilot project to design and test an evaluation process for a proposed career ladder program (the length of the pilot was reduced from two years to one due to fiscal problems) showed that the evaluation system could identify quality teaching and produce a reasonable range of ranking of teachers. Data included information from classroom observations, a discussion with the teacher about planning, and the teacher's ability to set and achieve goals in professional development. The project found that evaluation teams of an administrator and peer, a teacher and state observer, or three state observers were all within acceptable ranges of consistency in their assessment of teacher behaviors.

According to the State Department of Education, the Utah Career Ladder Program, now in its fourth year, has helped the district-designed evaluation systems to continue to improve with time. The districts are using many more kinds of evidence, such as principal evaluation, peer evaluation, student progress, student surveys, and parental input. Legislation in 1987 further specifies that joint committees of educators and school board appointees in each district design evaluation procedures; the legislation outlines criteria to be included. Originally, when programs started, all districts used different evaluation procedures. Now, four evaluation methods (based on effective schools research) are used by all the districts in the state. Two-thirds of the districts revised procedures during the first year of the Career Ladder Program.

The recent third-party evaluation of the Utah Career Ladder Plan states that principals now have increased responsibilities for evaluation. Teachers in Utah, according to the study, believe that the career ladder program has been most effective in providing more frequent teacher evaluations. Principals say an important outcome has been more effective teacher evaluation.

The Colorado *2 + 2 Project Report 1987* summarizes activities in districts under grants provided by the state to develop innovative programs. The Evaluator Training Program sponsors workshops on effective evaluation techniques and provides technical assistance to districts for improving evaluation systems. Recommendations are that evaluator training needs to continue and that technical assistance should be available.

The Arizona Career Ladder Research and Evaluation Project, established to compile information on that state's career ladder program, notes in a 1987 report that pilot districts with no evaluation procedures in place experienced more difficulty than those where procedures existed. The report emphasizes, however, that improvement from different starting points is a goal of the pilot projects. The report also notes the districts' continuing need for research and evaluation. The 15 pilot projects have established a network for sharing information and support for development of district programs.

Student achievement continues to be used as an evaluative consideration in several state and district programs. South Carolina and Florida fund school incentive programs to reward schools primarily for student achievement. Utah, Arizona, and South Carolina have teacher incentive programs that mandate the use of student achievement in assessment of teachers. Legislation enacted in 1987 in Texas called for the State Department of Education to study the use of student achievement in appraising teachers. A report is due to the 1989 legislature. In 1987, the Georgia legislature made a revision in the 1985 law establishing a commission to develop a career ladder program. The change specifies that achievement of students will be one criterion for moving up the ladder (the original law stated that student achievement *may* be included). The Alabama State Board of Education has directed the state superintendent to appoint a task force to examine methods and propose recommendations for a school incentive program that includes student achievement in the criteria.

The South Carolina School Incentive Program, established by 1984 legislation, provides incentive awards to schools based on student achievement gains, student attendance, and teacher attendance. Schools are grouped into five categories, based on background of students. Gains in test scores are analyzed against predicted gains by matching students' individual scores from one year to the next and aggregating them at the school level.

The Teacher Incentive Program in South Carolina is highly dependent on teachers documenting student achievement progress that exceeds expected growth. To aid districts and teachers, the State Department of Education and the University of South Carolina jointly prepared a technical assistance manual. The premise of the manual is, "Given the teaching situation, what are some sensible approaches to assessing student achievement?"

As mandated in the Utah career ladder legislation, student achievement is required as one piece of evidence used in evaluating teachers. The plans now show a greater reliance on measuring student achievement through classroom level techniques, such as teacher-designed tests rather than through the use of standardized tests, according to the state's analysis of the 1986-87 plans.

Two targets of the Arizona career ladder pilot projects are better teacher performance and improvement in student academic achievement. The recent report on the project notes that "all career ladder district plans have student achievement goals as a top priority." The evaluation project is studying the relationship between performance of career ladder teachers and academic achievement of students. Districts are using student achievement in a variety of ways as a part of teacher evaluation.

A special project in conjunction with the 1986-87 Kentucky Career Ladder Pilot Program to determine effective ways to use student achievement in assessing teacher performance found that parents, teachers, and administrators believe student achievement should include more than standardized test scores. Teachers identified student achievement outcomes that are common to all types of students and disciplines and those that are specific to particular subject areas.

Outcomes and Program Evaluations

"...can career ladder plans create opportunities for a fundamental restructuring of the teaching profession...?"

Career Ladder Clearinghouse, July 1985

While we know that change in the schools will occur slowly—and indications are that it may be slower than most persons anticipated—there must be extraordinary efforts before we will see differences in teaching and learning. Career ladders, mentor teacher programs, and bonuses based on performance have as goals recruiting and retaining teachers, improving teaching through evaluation and staff development, or improving the teaching and learning workplace.

Improvements in the teacher workplace must involve changes for over two million teachers—changes such as rewarding excellence, conversion from a "top down" system to one with teachers making more decisions about teaching, and removing burdens of paperwork and non-instructional duties so that teachers can spend more time teaching and counseling students.

Outside evaluations of several incentive programs have been completed or are underway. These studies are beginning to provide information on whether specific goals are being met and whether real change is taking place in schools.

The most comprehensive study to date by an outside agency is the Far West Laboratory examination of the Utah Career Ladder System, which includes four parts: extended day, job enlargement (additional duties), performance bonus, and career ladder levels. The study included interviews with superintendents and board of education presidents. Principals, teachers, and parents were surveyed. In addition, site visits were conducted at 12 of the state's 40 districts.

Preliminary evidence from the study suggests:

- The career ladder program is moving schools toward a new reward system.
- Major reform of management processes in the schools is being seen; shared leadership is developing; how teachers view their work is changing.

- A common language is being used to discuss curriculum reform, teaching effectiveness, and teacher evaluation.
- In districts where the programs are most effective there is now a strong relationship between district goals and those of teachers and principals.
- Teachers have more responsibilities for developing curriculum, evaluating peers, and in decisions about school and district goals; principals view their work differently as their instructional leadership increases.
- The system is being implemented differently in districts. The relationship between implementation of the program and impact is strong.

In Colorado, 20 pilot projects to develop innovative programs to advance teaching have been supported. Pilot projects showed mixed results, according to a State Department of Education report. Mentor teacher, teacher leadership, and school-based performance incentives were considered successful. Three years of planning time and additional funds are seen as necessary to design career ladders. The report noted that differentiated staffing programs will take four years to demonstrate results. Districts that originally intended to develop "merit pay" programs shifted to job ladders or incentive programs for all teachers. Based on the project, it was recommended that the General Assembly and the State Board of Education have primary responsibility for career development/recognition systems by providing funding and coordinating the development of guidelines for district-developed programs.

Teacher attitudes vary by programs within a state and from state to state, according to surveys of teachers. In Missouri, a May 1987 survey of 600 teachers (300 career ladder, 300 non-career ladder) found no differences in morale of teachers, but job satisfaction was significantly higher among the career ladder teachers. The Utah study noted strong agreement among principals and teachers that morale and leadership opportunities for teachers and the overall instructional program have improved.

The 1985 Arizona legislation establishing a Career Ladder Pilot Test Program included research and evaluation to determine if student achievement is increased through recognizing and developing high levels of teacher performance. Preliminary studies have compiled teachers' reactions to the programs. The 1987 results, based on the second year of the pilot (the first full year of implementation), noted that 50 percent of the teachers in the pilot districts have applied for or been placed on the ladder. As in other states, teacher support for the career ladder concepts differed by district. The study showed a significant positive relationship between climate in districts and support for the career ladder program. Attitudes between participating and non-participating teachers showed career ladder teachers showed more support for career ladder "concepts" than did non-career ladder teachers; less experienced teachers were more positive; females supported concepts to a much greater degree than males. There was agreement about the importance of extrinsic rewards of money, but intrinsic rewards are seen as poorly defined or utilized in the programs. (The report notes that given the problems with adequate funding, this should be an area for further study.) While 72 percent of participating teachers believed the program will improve instruction, only 52 percent of non-participating teachers did. On the other hand, about the same percentage of both groups of teachers (around 43 percent) said it would improve teacher cooperation; 29 percent felt it would improve teacher morale.

Teachers were asked to provide open-ended responses to questions about program strengths and weaknesses. Just over one-third (34 percent) of the teachers said higher pay rather than the traditional salary schedule and incentives to keep up the good work were the greatest strengths. The need for a uniform method of evaluation was reported by 28 percent of teachers as an area needing improvement.

The South Carolina study documented teachers' attitudes about the Teacher Incentive Program in the state. (Three models are being piloted in South Carolina—bonus model, career ladder, and school incentive/individual models.) About 17 percent of the eligible teachers participate in the program; budget estimates were based on 20 percent. The time required and opposition to the notion of competing were reported as major factors for those not participating. Most teachers said that each school should not necessarily have the same percentage of teachers awarded bonus pay. A majority of the teachers did not think the program had encouraged teachers to improve their teaching skills or that it had helped keep superior teachers in the classroom. Forty-four

percent of the teachers agreed that an unbaised process could be implemented to identify and reward superior teachers. The authors of the study conclude, "It would be naive to expect teachers—even those voluntarily participating—to strongly support an externally-mandated program that breaks a long-standing tradition of paying teachers on a non-competitive, non-productivity-oriented basis."

Providing new roles for teachers on a short-term basis may create problems. One local district evaluator is employed for every 96 employees to be evaluated in each pilot district in the North Carolina Career Development Program. Difficulties in returning to the classroom have been reported, with teachers noting that returning to a more regular classroom setting is difficult.

A North Carolina project that is working to restructure schools by providing new roles for teachers is "marrying" the lead teacher idea to the state's Career Development Program. The program, authorized by the 1987 General Assembly, provides additional salary to Career Status II and III teachers who take on additional duties.

Sustained Commitment

Evaluation procedures are changing, a common vocabulary for discussing instruction is emerging, and more attention to instruction by those outside the classroom is evident as incentive programs for teachers, administrators,and schools are put into place. A key question is whether or not commitment by political and educational leadership—both at the state and local levels—will be sustained long enough to give the programs a fair test.

Reports from some states that because of the programs schools may be changing are encouraging. Will it be enough? Programs are not yet "finished products." Teachers and administrators in local districts will need to work closely with state educational and political leaders to urge the necessary changes. State and district leaders will need to be responsive but diligent in overseeing that programs are being implemented as originally intended. At the same time, leaders will have to be ready to make changes and "fine tune" to find methods that work best.

Career ladder and incentive programs provide ways to restructure schools, reward superior teaching, and focus on student learning; however, additional efforts and sustained commitment will be necessary before real change is seen.

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INCENTIVE PROGRAMS — 1987

	Local Initiative Only	Pilots with State Funding and/or Assistance	Full Implementation of State Program	State Program Under Development	Discussion No Legislative Action Pending	Type of Program
Alabama				X		Career Ladder
Alaska						
Arizona		X				Career Ladder
Arkansas		(Not funded)				Career Development
California			X			Mentor Teacher
Colorado	X					Teacher Incentive/ Career Ladder
Connecticut				X		Teacher Incentive
Delaware		X				Career Development
Florida			X (1)	X (2) (Not funded)		(1) School Incentive; (2) Career Ladder
Georgia				X		Career Ladder
Hawaii						
Idaho				(Not funded)		Career Compensation
Illinois		X				Teacher Incentive
Indiana		X				Career Ladder/ Teacher Incentive
Iowa			X			Teacher Incentive
Kansas	X					Teacher Incentive
Kentucky		(Completed in 1987)				Career Ladder
Louisiana		(Not funded)				Career Ladder/ School Incentive
Maine				X		Tiered Certification Incentive
Maryland	X					Career Development Incentive
Massachusetts			X			Teacher Incentive
Michigan						
Minnesota	X					Teacher Incentive
Mississippi			X			Teacher Incentive
Missouri			X			Career Ladder
Montana	X					Teacher Incentive
Nebraska				X		Career Ladder
Nevada						
New Hampshire	X					Teacher Incentive
New Jersey			X			Teacher Incentive
New Mexico					X	
New York			X			Teacher Incentive
North Carolina		X				Career Ladder
North Dakota						
Ohio	(With state assistance)					Career Development
Oklahoma	X					Teacher Incentive
Oregon		X				Career Development Mentor Teacher
Pennsylvania			X			Career Development Mentor Teacher
Rhode Island		(Under consideration)				Mentor Teacher
South Carolina		X (1) X (2)	X (3)			(1) Teacher Incentive (2) Principal Incentive (3) School Incentive
South Dakota						
Tennessee			X			Career Ladder
Texas			X			Career Ladder
Utah			X			Career Ladder
Vermont	X					Career Ladder/ Teacher Incentive
Virginia		(Completed in 1986)				Career Ladder/ Teacher Incentive
Washington			X			Mentor Teacher
West Virginia				X		Teacher Incentive
Wisconsin		X				Career Ladder/ Teacher Incentive
Wyoming						

Southern Regional Education Board

Alabama

The Alabama Career Incentive Program for teachers is completing Phase I; evaluation instruments and procedures have been developed and tested. The original 1985 legislation established the program in two phases—Phase I to develop evaluation methods and Phase II to implement the program, with salary increases for teachers who are placed on the Career Professional II or Master levels. During 1987-88, all teachers will be evaluated; information will be used for placing teachers on the upper levels of the ladder if funding is provided by the 1988 legislature. A commission appointed to develop the procedures was involved in controversy during 1985-86 and was slow to come to agreement, which delayed implementation of the evaluation procedures by one year.

The evaluation system was field-tested in the spring of 1986. Over 3,000 school and central office administrators were trained to conduct classroom observations and pre- and post-conferences with teachers in the fall of the 1986-87 school year. To be certified as an evaluator, administrators must pass a written test and be proficient in making classroom observations.

According to state officials, the emphasis on evaluation procedures has provided administrators and teachers with a common language about instruction and a focus on how to improve conditions for learning.

Because of fiscal problems in the state, full funding for the program in 1988-89 is not expected. However, the evaluation plan is expected to continue, and discussions about a modified program are underway.

Alaska

Due to declining oil revenues, Alaska has no career ladder or teacher incentive programs. Local districts have the authority to establish such programs, but given the economic outlook, it is unlikely that any are currently being initiated.

Arizona

Legislation passed in 1984, 1985, and 1986 established and amended a five-year career ladder pilot program and authorized a Joint Legislative Committee (consisting of ten legislators, one educator, one member of the State Board of Education, and one additional member) to be involved with the approval and monitoring of pilot districts. As legislated, the pilot program involves the approval and funding of locally designed programs developed in consultation with teachers. Criteria for the projects include procedures that stress a multifaceted approach to the assessment of teacher performance, a compensation system based on a completely restructured salary schedule, evidence of teacher support, and a way to show how student achievement would be improved.

The 1986 law provided for eventual statewide career ladder implementation subject to legislative approval and voter approval of a constitutional amendment increasing the spending limit for school districts. By January 1, 1988, the Joint Legislative Committee must make preliminary recommendations regarding possible statewide program implementation beginning in 1989-90. One estimate projected implementation would cost approximately $60 million.

Currently, 15 districts within the state are in some phase of implementing career ladder programs—seven districts began programs in 1985-86; three in 1986-87; and five in 1987-88. State funding for 1987-88 has been provided at a level of $8.8 million, a $4.8 million increase over 1986-87.

Arkansas

Because for the second year, the Teacher Career Development Commission was not funded, no grants were made to school districts for locally-developed pilot projects. Funding shortfalls in the state mean that the future of the program is uncertain.

The Commission, appointed by the governor, was established in 1985 according to legislation that called for pilot projects. Five districts developed plans at the local level.

California

The California Mentor Teacher Program, created in 1983, is intended to encourage retention of exemplary teachers and upgrade the skills of experienced as well as new teachers. This is to be accomplished by selecting "mentor teachers" who are designated to spend part of their time working with new and experienced teachers.

Individual school districts and county offices voluntarily participate in the mentor program. The legislation establishing this program allows districts broad latitude in designing, implementing, and evaluating their individual mentor programs. The intent is that each district develop a program tailored to the particular educational needs of its staff.

State law authorizes districts to designate up to 5 percent of their certified teachers as mentors; state funds, however, have not been sufficient to fully support the statutory limit. Each mentor receives a $4,000 stipend and the local district receives an additional $2,000 per mentor for support costs, such as training and release time.

Funding and participation have increased significantly since the program was initiated. In 1984-85, the first full year of implementation, a $30.8 million appropriation supported 4,362 designated mentors in 742 districts. This financed 2.84 percent of the teachers in the state. In 1987-88, funds amounting to $49.75 million are available to support 8,273 teachers, approximately 4 percent of the state's teachers.

There are no legislative requirements as to how mentors shall be evaluated. Districts are encouraged to work closely with mentor selection committees to ensure that evaluation processes are developed in collaboration with sound measurement practices and that they mirror the real work mentors have been doing.

Colorado

As a part of the Educational Quality Act of 1985, a two-year research and development project was funded to improve educational quality. Under this program, 20 pilot projects were supported to research and test the value of innovative programs to advance teaching. The projects addressed such issues as career ladders, mentor teacher programs, career enrichment, and performance incentives. The Department of Education's final report on the program in August 1987 concluded that a statewide approach to the issue of incentives was not feasible for Colorado. It recommended that the state should coordinate the development of guidelines for teacher advancement and recognition which would allow for local district variations, and that local districts should establish opportunities for the advancement, recognition, and compensation of teachers within those state guidelines.

Connecticut

In January 1987, legislation was signed into law by the governor that addressed increases in minimum salaries for teachers (to $20,000), professional development, teacher evaluation, and teacher career incentives programs. Under this law, the Connecticut Department of Education is providing grants to assist local and regional boards of education and regional educational service centers in developing new or revising existing teacher evaluation programs. Grants are also provided to plan teacher career incentive programs. The development of career incentive programs may include compensation related to factors other than seniority and academic degree; the naming of mentor and cooperating teachers; curriculum development; peer assessment; peer counseling; master teachers; a career advancement ladder; and the consideration of performance, experience, job-related education, and advanced academic training.

The teacher evaluation and the career incentives programs each received $1 million in funding for grants to be made either in 1987-88 or 1988-89 (districts may apply for funds in one year or the other but not in both). It is anticipated that funds will be available in 1988-89 for implementation and continued development of teacher career incentive and teacher evaluation programs.

Delaware

Early efforts in Delaware focused on career ladder and other teacher incentive programs. Funds were appropriated in 1985 for the development and implementation of a career ladder program. When agreement on a program could not be reached, the funds were used to develop teacher training models and to implement a statewide evaluation instrument.

Delaware is now emphasizing professional development for teachers and principals. All teachers are being trained in the elements of effective teaching; principals are being trained in evaluation fundamentals. Additionally, four pilot districts are involved in a career enhancement program. The Christina School District pilot project is based on different skills and levels of performance for each staff position. The program includes additional working time, extended responsibilities, performance measured through observations and the use of student outcomes. The first year of the program (1987-88) includes: a mentor program in which teachers will work with new teachers and provide ongoing assistance to peers, grants for innovative instructional projects, and funds for school improvement projects. Incentives for attendance and student outcomes are to be phased in for the 1988-89 school year.

Florida

Legislation in 1986 established the Raymond B. Stewart Career Achievement Program. The 1986 program was developed after the 1983 Master Teacher program was repealed. In the new program districts are more involved in determining who should move up on the ladder. Classroom observations would be conducted by a supervisor and a peer from the district. The program would be negotiated at the local district and approved by the State Department of Education. The career advancement system has three levels: Level I is for beginning teachers who meet district requirements for employment; Level II requirements include four years of teaching experience, possession of a professional service or tenured contract, and the attainment of specific percentile ranking on subject area tests and performance evaluations; Level III requirements include six years as a Level II teacher, a master's degree in the subject taught, possession of a professional service or tenured contract, and the attainment of specific percentile ranking on subject area tests and performance evaluations.

In March 1987, district proposals were submitted from 39 of 67 Florida school districts for program implementation during the 1987-88 school year. Because the required funding was not appropriated by the 1987 legislature, implementation of the program has been temporarily deferred. The statute specifies that if $90 million is not appropriated by July 1988, the program will be repealed.

Georgia

Mandated by 1985 legislation, the State Board of Education appointed the Career Ladder Task Force, which provided the State Board of Education with detailed recommendations in June 1986. These recommendations were carefully studied by staff, and plans for implementation were developed. The draft plan was presented to the State Board of Education in February 1987. Six thousand copies of the draft were distributed to educators and interested citizens throughout Georgia for review and comment. As respondents began raising concerns, questionnaires were developed to elicit further feedback.

The plan includes five career levels: Level I teachers are those entering the profession or ones with less than three years of experience. Level II is for teachers who have completed all requirements for regular teaching status, but who do not wish to move up on the ladder, to receive supplementary compensation. Teachers will develop three-year professional plans for moving to the upper levels. A district review team will make recommendations for advancement on the ladder, based on evidence presented by the applicant. Pilot testing of the Georgia Personnel Evaluation System was carried out in nine school systems during the 1986-87 school year. Further refinements and pilot testing will take place in 1987-88. Funding for development and implementation is $1.3 million.

The Department of Education is presently revising the February draft incorporating the feedback and concerns of Georgia educators and the experiences gained from other states. The revisions are scheduled to be presented to the State Board of Education in December 1987. Details about local system plans and evaluation will be worked out after a final draft of a plan has been approved by the Board of Education.

The General Assembly made a revision in the law during the 1987 session. The original legislation called for development of a plan for rewarding average-or-above classroom performance, which may include the achievement of students beyond the level expected. 1987 legislation specifically includes the use of achievement of students beyond the typical level as one

criterion for moving up the ladder. The new plan is to be reviewed by the General Assembly prior to funding.

The Bibb County Schools support a Pilot Quality School Performance Plan that offers bonuses to teams of elementary teachers to improve test scores in grades two through six. The program is financed through funds raised in the business community. Twenty-one elementary schools volunteered for the program and three were selected for the 3-year project.

A goals committee composed of educators and business persons established the scores expected to be achieved on nationally-normed tests. Training was provided to the staff of each participating school. All persons in the school holding a certificate are eligible for the cash bonus (a maximum of $2,000), which is determined by the improvement in test scores. Over $75,000 had been awarded to staff by the end of 1986-87 (the second year of the project).

Hawaii

A number of programs implemented in Hawaii have offered incentives for teachers to relocate to remote areas of the state or to supervise pre-service instruction. An alternative certification program has also been implemented to address teacher shortages in mathematics and science. This program involves provisions for certifying persons with undergraduate degrees in mathematics and science as well as current teachers desiring to seek certification in the shortage areas.

The Reaching for Excellence in Instruction Schools Incentives Program (REISIP) was developed to improve the quality of instruction provided by teachers and to increase student performance by recognizing and rewarding school administrators and teachers. The Department of Education requested that the 1987 legislature appropriate $2 million to implement the program during the 1987-89 biennium; however, funds were not provided.

Idaho

Legislation enacted in 1984 permitted school districts to participate in the Teacher Excellence Program; $100,000 was appropriated for administration and assistance to local districts in developing career compensation plans in fiscal 1985, with the expectation that these plans would be implemented during the following year. While the 1985 legislature did not appropriate the funding for local career compensation plans due to economic considerations, $90,000 was provided to the State Department of Education to continue a local district assistance program, with a verbal commitment to address the career ladder issue in upcoming legislative sessions.

The 1986 and 1987 legislatures did not appropriate funding for the local career compensation plans. Districts are submitting plans for approval in anticipation of funding by the 1988 legislature, although there appears to be little hope that funding will be provided.

Illinois

The Education Reform Act of 1986 authorized the establishment of a Center for Excellence in Teaching within the State Board of Education to conduct a study of teacher career compensation programs based on merit. The State Board of Education was authorized to fund five to seven pilot programs in local districts; $1 million was allocated for the implementation phase during 1986-87.

The pilot programs were designed to identify, from an array of various types, compensation programs that the General Assembly might then extend on a statewide basis. Proposals were solicited from all Illinois school districts; 30 proposals were received, all of which were developed by the school districts in conjunction with their teachers and a participating university. In March 1986, seven districts, representing a diverse collection of sizes and types and with programs offering a variety of approaches to the compensation issue, were awarded grants to continue developing plans for implementation of a full year of career compensation during the 1986-87 school year.

Indiana

In 1985, the Indiana General Assembly passed a law which required the State Superintendent of Education to determine the feasibility of a career ladder plan and to develop methods to honor, recognize, and provide professional growth for teachers. A teacher quality team was created by the state superintendent in response to this law. The team, with the assistance of three advisory

committees that included more than 100 individuals, developed a request for proposals for pilot projects involving career ladders and career development. The general assembly appropriated $6 million for an initial two-year period.

By January 1987, 76 pilot projects were addressing the issues of honor, recognition, and professional development of teachers, and seven districts and one educational organization were conducting career ladder studies. In August 1987, the most popular results of these pilots were incorporated into a preliminary draft of a plan that would allow state dollars to fund activities above a teacher's core salary.

The draft plan includes career development and career ladder plans. The career development plan builds on a teacher's core salary. The five areas beyond the core salary include professional attainment (teachers are trained in a specific professional development activity then, in turn, teach other teachers); mentoring (an experienced teacher guides a first-year teacher or another experienced teacher); mini-grants (to fund such projects as the development of in-school projects, curriculum materials, or summer projects); participatory management (teachers participate in the decision-making process); and outcome-based education (students progress from one instructional unit to another as significant progress is achieved).

Four of the original eight career ladder study sites have been selected to continue developing their plans during 1987-88. The diverse plans will offer four distinct types of career ladder programs for the state. The structure of these plans will be available for review by the districts early in the 1988-89 school year.

Participation in the proposed program is voluntary on two levels. First, district participation in any or all of the plan's elements is optional. Second, teachers within each district can opt to participate in any part of the district's adopted program.

Funding has been provided for the 1987-89 biennium at a level of $4 million, the majority of which will be utilized to support regional networks designed to train teachers and develop instruments associated with the career development plan.

Iowa

Legislation enacted in 1987 established the Educational Excellence Program consisting of three major phases addressing the following areas:

Phase I — the recruitment of quality teachers

Phase II — the retention of quality teachers

Phase III — improving the quality and effectiveness of teachers

Phase I establishes a minimum teacher salary of $18,000 for all teachers. Phase II provides district boards of directors with funds to improve salaries above the minimum. Phase III promotes excellence through the development of performance-based pay plans and supplemental pay plans requiring additional work assignments. Each district wishing to participate in Phase III must appoint a committee composed of administrators, teachers, parents, and other interested individuals to develop a proposal relating to performance-based pay, supplemental pay, or a combination of the two. The proposal is to be considered by the district board of directors in developing a plan for submission to the Iowa Department of Education. District entitlements for approved plans will be based on an enrollment formula.

The legislature appropriated $92.5 million for the 1987-88 school year. Of this amount, approximately $43 million will be available for the implementation of Phase III plans.

The Des Moines Independent Community School District has appointed a planning committee that has developed a proposal for participation in phase III, which encompasses a combination performance-supplemental pay plan utilizing four career levels—probationary and career levels I, II, and III. Criteria for entry into the career levels will be based on experience, education, evaluation, service, and professional growth/staff development. The proposal provides for a three-year phase-in of the program prior to full implementation. Incentives associated with the career levels will include salary stipends for performance, pay for additional work, incentive payments for staff development, grants for professional growth, paid attendance at conferences, and sabbaticals.

Kansas

The Commissioner's Task Force on Teacher Incentive Structures, created in 1985, recommended in its report that incentive systems should be developed at the local level rather than on a statewide basis. While local boards have the option to initiate such programs, few have done so.

Kansas has been plagued in recent years by a sluggish economy that is anticipated to recover somewhat in the upcoming year. Despite this estimate, there appears to be little prospect for the consideration of any teacher incentive proposals during the 1988 legislative session.

Kentucky

The one-year, $2.5 million pilot career ladder project has been completed and recommendations will be made to the 1988 legislature. The pilot program, in accord with 1984 legislation, was originally designed for two years, but was reduced to one year because of fiscal problems. Forty-seven schools and over 300 teachers participated. Teachers, who participated voluntarily, received a $1,000 stipend. The project focused on field-testing evaluation procedures. Based on the 1986-87 pilot program, the Career Ladder Commission recommends that the Department of Education continue the research and development of teacher evaluation. In addition, training and assistance for districts to implement the evaluation procedures is suggested. The Commission also recommends that the Kentucky General Assembly pass legislation to establish demonstration sites in three school districts to continue the refinement of evaluation procedures and use differential salary schedules.

Louisiana

Projects to provide incentives for teachers have been slowed or stymied because of the fiscal crisis in Louisiana. After a 1984 Career Ladder Commission failed to reach agreement, 1985 legislation established the Teacher Incentive Pay Models Program to provide grants to districts for pilot incentive programs. However, no funding is available. Several other programs for teachers have also been established by the legislature, but not funded. Included is a teacher internship program that would require beginning teachers to be evaluated and supported during the first year of employment by a principal, a master teacher, and faculty from a teacher education program. A Mentor Teacher Program to utilize mentor teachers in assisting new teachers was included in 1986 legislation. Mentor teachers would work an additional 10 hours per week for additional compensation. No funding is available. Teacher of the Year awards are given and the state will provide $1.8 million during 1987-88 in tuition exemption for teachers so that they can pursue coursework in their respective subject areas.

Maine

A two-year certification pilot study was conducted by 20 school districts from April 1984 through December 1986 as a result of legislation adopted in 1984. This law established three levels of certification—a two-year provisional certificate for beginning teachers, a renewable five-year professional certificate, and a master teacher certificate. Under the law, while serving the two-year provisional term, beginning teachers are supervised and evaluated by support systems consisting primarily of teachers; criteria include professional classroom skills and subject matter knowledge. After successfully completing the provisional term, the teachers will be granted the professional certificate. Professional teachers are eligible to apply for a master teacher certificate.

Legislation to amend the elements of the 1984 law was passed during the 1987 session. The legislation included a plan to eliminate the master teacher level of certification while continuing the provisional and professional levels. The governor subsequently vetoed the elimination of the master teacher certificate, effectively continuing the three-level certification program adopted in 1984 This certification program will take effect July 1, 1988.

The State Board of Education has recently adopted procedures for the statewide implementation of the certification program, standards for the support systems, and a process for appeals pertaining to applications for the issuance and renewal of certificates. The support systems as defined in the adopted procedures are locally-developed, state-approved mechanisms for assisting teachers in meeting certification requirements. Each district's support system is to be comprised of a governance committee that includes a majority of classroom teachers. A plan for

the support system based upon stated criteria must be developed by a planning committee in each district and submitted to the State Department of Education for approval.

Maryland

A 1986 resolution of the House of Delegates established a governor-appointed Commission on Teacher Salaries and Incentives to examine financial and non-financial awards in teaching. Specific issues to be addressed were salary increases and incentives, such as expansion of scholarship programs in teacher education, mentor teacher/new teacher induction programs, and summer employment of teachers to conduct research in their content areas. The Commission also examined funding to ensure a well-trained and motivated teaching staff. A final report was presented to the governor in October 1987.

Incentive programs for teachers and administrators are continuing to develop at the local level. Legislation in 1984 enabled districts to receive state education aid to develop programs for improving teacher performance.

The Teacher Plus program in the Frederick County Schools is in its third year of implementation. The program focuses on teacher assignments that recognize the professional competence of a teacher. An additional 10 days of pay provide opportunities for professional development. The present indication is that the program is highly successful. Carroll County schools provide differential pay for duties such as team leader or department chair. Rankings for administrative positions are also given. Harford County schools have implemented a program to recognize elementary school teachers for significant and unique types of curriculum activities and projects. The program provides both monetary awards to teachers and a vehicle for sharing the exemplary projects with elementary schools throughout the country.

Massachusetts

The Public School Improvement Act of 1985 established a far-reaching program of educational reform that included several types of teacher incentive programs. The act called for a minimum teacher's salary of $18,000, and state funding to pay for some of the educational expenses of those who agree to teach within the state after their graduation. The legislation also established the "Horace Mann Teacher" designation and the Lucretia Crocker Exemplary Education Program. Under the former, the Board of Education developed guidelines for establishing programs for expanded duties for teachers, including responsibilities for training teachers, developing curricula, providing special assistance to potential drop-outs, and serving as in-service instructors or consultants. Subject to collective bargaining, school committees designate the Horace Mann teachers on the basis of criteria supplied from the State Board of Education. Each school district may apply for a grant equivalent to $120 per teacher; maximum extra compensation for each Horace Mann teacher is $2,500. There is a possibility that legislation will be introduced during the 1988 session to increase these amounts.

The Lucretia Crocker program was created to award teacher fellowships to develop, replicate, and disseminate exemplary educational programs that have been successful in advancing academic and creative achievement and creating a better school climate. Exemplary programs nominated in January 1986 were implemented in the 1986-87 fiscal year. Currently, 20 one-year fellowships are being supported by the state.

The Joint Task Force on Teacher Preparation, convened in May 1987 by the Board of Regents of Higher Education and the Board of Education, proposed the creation of a mentor teacher program as a part of its recommendations. The role of the mentor teachers was seen as a critical element in the preparation of new teachers. The task force recommended that teacher preparation programs be revamped to require extensive classroom experience supervised by the mentor teachers. While the task force did not detail the mechanics of such a program, it did recommend that mentor teachers complete a training program, receive salary supplements and release time to perform their supervisory responsibilities, and hold a joint appointment to the public school and to the college from which the supervised students are completing their degrees.

Michigan

Currently, there is no state-level effort toward establishing performance-based programs for teachers and administrators. The major focus of the Michigan State Board of Education has been to tighten certification requirements for teachers effective September 1, 1988.

There is a possibility that tuition assistance for prospective teachers may be addressed during the upcoming legislative session. The Michigan State Board of Education appointed a special task force commission that reported in October 1986 on the supply and demand of teachers. The commission recommended that such assistance be made available. One legislator has expressed an interest in offering legislation to provide tuition assistance to future teachers.

Minnesota

There is no statewide program of teacher incentives. Local boards, however, have been given discretionary power to adopt their own incentive programs using local district funds. The State Board of Teaching has furnished some guidance for developing programs. There are no plans to introduce a general incentive system in the upcoming legislative session.

Mississippi

About 98 percent of the teachers in Mississippi who have been evaluated using the Mississippi Teacher Appraisal System have passed, and are to receive an additional $1,000 for 1987-88. The money is the third part of the three-year pay raise; the last year is based on merit, according to a 1985 legislative mandate.

Teachers were assessed using the Mississippi Teacher Appraisal instrument. Administrators were trained to make classroom observations using the statewide procedures. Administrators and instructional support personnel will also be evaluated.

The Board of Trustees for the Jackson Public School District has adopted a Professional Growth Plan for certified faculty members of the district. The plan, which is set to be implemented over the next five years, will establish four categories for teachers: (1) provisional teacher, (2) certified teacher, (3) senior teacher, (4) master teacher. With each step in this four-step plan, the faculty member is given more responsibility, contract time, and compensation. The entire process will be administered by a Professional Growth Plan Board, composed of four master teachers elected by the master teachers of the district, who will serve two-year terms on a full-time basis. Under this plan, a master teacher could eventually make $42,000 per year.

Missouri

In April 1986, the State Board of Education approved a career ladder model and guidelines for the development of individual district plans. The model was developed by an advisory committee appointed by the State Board as a result of a 1985 education reform act. The model consists of three stages, each of which contains a set of predetermined criteria. Both district and teacher participation is voluntary; however, should a district decide to participate, it must guarantee local funds to supplement an allocation made by the state in reaching the state-specified salary supplement levels: $1,500—Stage I; $3,000—Stage II; $5,000—Stage III. District plans must conform to the state model and guidelines. In 1986-87, 2,369 teachers, librarians, and counselors in 63 school districts qualified to reach Stage I. The state provided $2.6 million to support the first year of implementation.

For 1987-88, the state appropriated $8 million to continue the career ladder program. It is estimated that 45 districts will implement Stage II. Estimates indicate total participation in the second year of the program to be 5,600 teachers (12 percent of all teachers in the state) in 128 districts (24 percent of the districts).

Montana

During 1985-86, an experimental administrative program was implemented to identify teachers with the potential of becoming principals and to assist these teachers in completing certification requirements. The selected teachers may act in the capacity of principal under supervision for a period of up to three years while working toward certification. A similar program was initiated in 1987-88 for those certified teachers seeking their special education endorsement. While completing the requirements, a person may teach in special education under supervision for up to one year.

Although the governor raised the issue of incentive pay for teachers three years ago, the legislature has not considered the issue. The State Board of Public Education and the Montana Education Association have, however, initiated a certification advisory group to review issues pertaining to the teaching profession.

Nebraska

Provisions for a career ladder were enacted by the legislature in 1984 as a part of the governor's omnibus education improvement bill. The legislature postponed the implementation date twice. In 1987 legislation, the implementation date was removed from law and a provision was added that made initiation of the program dependent upon funding. Funding still has not been provided to the Department of Education for development and implementation of the program.

Nevada

The Committee on School Improvement Through Incentives, in an April 1985 report directed to legislators and state and local education agency personnel, recommended that local districts be encouraged to develop various kinds of incentive programs with state funding. However, no legislation has been enacted, no funding has been provided, and there has been no real movement toward any sort of incentive system in any of the local districts.

New Hampshire

The New Hampshire educational system is decentralized and is primarily financed through local funds. The State Board of Education has encouraged local districts to adopt compensation and incentive plans for teachers; however, any action taken is strictly a matter of local option. Several districts are experimenting with some form of incentive program. The State Board of Education is monitoring such efforts with the intent of passing along useful information to other districts contemplating the development of similar programs.

New Jersey

Continuing state initiatives to improve the teaching profession include a guaranteed minimum salary of $18,500 for all public school teachers; the Governor's Teaching Scholars Program to attract talented high school students to teaching; the Governor's Teacher Grant Program, which awards up to $15,000 each for creative teachers to develop effective strategies and disseminate them to others as models; the Academy for the Advancement of Teaching and Management, designed to train teams of teachers and principals in proven techniques of instruction and instructional supervision; and the Commissioner's Symposium for Outstanding Teachers in which 100 of the state's outstanding teachers are chosen to receive awards and to attend a three-day summer workshop for exchanging ideas with other state educators.

Two new programs were introduced in 1987-88. The Minority Teacher Program is designed to attract promising minority high school students to the teaching profession. College loans of up to $7,500 per year are available and will be forgiven in return for teaching service in New Jersey schools. The Public Service Information Campaign on Teaching provides accurate information on teaching as a career and describes the programs initiated by the state to enhance the teaching profession.

Teacher certification standards have been raised in several ways, including the implementation of the Provisional Teacher Program where qualified candidates who have not completed college teacher preparation programs can earn certification; emphasis on subject matter competency as well as strengthening of traditional college teacher preparation programs; the requirement that teaching candidates hold bachelor's degrees in liberal arts, science, or technology; and the requirement that all new teacher candidates pass teacher competency tests before they can be certified.

New Mexico

In 1985, the legislature requested continued study of performance-based pay systems, but severe drops in state revenues due to the oil crisis continue to undermine efforts to initiate incentive programs. The newly elected governor is interested in establishing pilot performance-based

pay programs in school districts; however, it is difficult to predict whether the legislature will be receptive to such programs in light of the revenue outlook.

New York

Increased financial support has been provided for 1987-88 to expand a number of programs designed to strengthen the teaching profession. The legislature appropriated $131 million to increase teacher salaries, as compared to $95 million last year. The Mentor Teacher-Internship Program was increased from $4 million to $8 million in its second year of implementation for districts to initiate programs that provide first-year teachers with guidance, support, and leadership from their more experienced colleagues. Funding for teacher education centers increased by $5 million to a total of $15 million. The goal of these centers is to assist teachers and other school personnel in increasing their capacity to meet the educational needs of their students.

Funding remained stable in the Empire State Challenger Scholarship and Fellowship Programs ($4 million) for students preparing to teach in shortage areas and in the Teacher Summer Business Employment Program ($6.4 million), which provides incentives to private employers for hiring teachers during the summer.

The Teacher Opportunity Corps was initiated with a $1 million appropriation in an effort to attract potential teachers into working with at-risk students. The funds, allocated to teacher education programs, will be used to provide enriched instruction in the special needs of the at-risk student.

The Rochester Board of Education and the Rochester Teachers Association have negotiated an agreement that involves a career program for teachers that contains several levels. Beginning teachers will start as interns for the first year while working under the supervision of experienced teachers. They will then have the opportunity to progress to a resident status (years 1 through 4) and then to a fully-licensed professional. Beyond the professional level is one further category—lead teachers, who will be selected by a joint panel of experienced teachers and administrators and will spend at least 50 percent of their time teaching. The lead teachers will spend the balance of their time serving as mentors to new teachers, as intervention teachers working with experienced teachers who are having trouble in their duties, or in other leadership roles. In an agreement with the University of Rochester, upper-level teachers may become adjunct faculty. Movement along this path is not automatic—teachers whose difficulties are not sufficiently remedied through the assistance of a lead teacher will be removed or will be placed in a more suitable position within the system.

The second element in the negotiated agreement involves raising teacher salaries. If the agreement is ratified, teacher salaries are scheduled to increase by more than 40 percent over a three-year period. The average teacher salary in Rochester would increase from last year's level of $32,651 to $45,774 in the third year of the plan.

North Carolina

The Career Development Program (a four-year pilot program) mandated by 1984 legislation is entering its third year with funding of $16 million —about $4 million more than in 1986-87. Involving 16 districts in the state, 96 percent of the eligible teachers are participating; nine districts have 99 or 100 percent participation.

The first year of the pilot project, 1985-86, was spent in developing a new statewide evaluation procedure and an extensive in-service program to train school teachers, evaluators, and administrators in effective teaching research. In the fall of 1986-87, all teachers receiving an "at standard" evaluation were placed at Career Status I and advanced an additional step on the salary schedule. At the end of the second year (1986-87), 42 percent of the staff in the pilot districts were awarded Career Status II. (These teachers have to perform "above-standard" on classroom evaluation and meet experience requirements.) Career Status II teachers earn 15 percent more than they would ordinarily earn. Approximately 80 percent of those who applied moved to Status II. This varied from 22 to 53 percent across the districts. The state has compiled data about the evaluation methods and will continue to do so during the pilot years. Studies are underway to increase the reliability and consistency of the evaluations. Outside evaluators are also being used to check on reliability across the pilot districts.

The 1987 legislature expanded the original legislation and provided $4 million for Career Status II and III teachers who take on additional responsibilities. This is in addition to the extra 15 percent that Career Status II teachers earn. Duties for Status II teachers include supervising student teachers, staff training, and curriculum development. Status III teachers will be eligible for department or grade chair assignments or lead teachers.

State board and legislative committees are currently conducting studies of the state's pilot programs.

North Dakota

A state model for in-service education and staff development, designed to serve the local school districts as a basis for determining total needs of the veteran teaching staff, has been adopted. The design of assessment instruments to accompany the model is being discussed.

No initiatives on career ladders or teacher incentive programs were forthcoming during the 1987 legislative session.

Ohio

In December of 1984, the State Board of Education adopted a Master Plan for Excellence that called for the establishment of a career ladder and peer review program.

In Toledo, the public schools and Federation of Teachers have established the Toledo Career Development Plan for the Professionalization of Teaching designed to give teachers more responsibility, opportunity for professional growth, and competitive salaries. The career ladder plan has five steps after initial qualification; teachers can reach the top level in 8 to 12 years. Reaching the top level will add $15,000 to a teacher's base salary. The initial qualification to begin working up the ladder is based upon five areas—letters of reference, a written essay, an interview before a three-member committee, a language test, and six classroom observations by three mentor teachers. Movement further up the ladder will require classroom observations and additional assignments. Teachers may opt to remain at the second level of the ladder, which requires periodic observation to hold that position. The top two levels require a master's degree or graduate hours in an academic area. The state provided $300,000 to the Toledo schools for the program. It is estimated that these funds will be barely sufficient to keep the program going for the initial two years of implementation.

Oklahoma

Statewide criteria for evaluating teachers and school administrators is in place in the state, according to 1985 legislation. Criteria were written as guidelines for district-developed evaluation procedures. Since 1986, tenured teachers have been evaluated yearly; evaluations of probationary teachers take place twice a year. The State Department of Education training required for all evaluators is ongoing. Although a career ladder was proposed in the 1985 legislature, no action was taken.

Oregon

The 1987 legislature passed a bill that provides for a professional development and school improvement program. $2.4 million has been appropriated for the 1987-89 biennium to support local committee-developed pilot projects at individual schools. Funds will be allocated by providing $1,000 per teacher at each pilot site. Within the same legislation, the Beginning Teacher Support Program has been established to ensure that the induction of beginning teachers is conducive to professional growth and development. As outlined in the law, each district that qualifies to participate in the program will receive $3,000 to support each beginning teacher. Currently, 55 districts and 185 beginning teachers are participating in the program. It is estimated that 760 beginning teachers will participate during 1988-89. Biennial funding has been provided at a level of $3 million.

Additionally, the Oregon Teacher Corps Program has been established to encourage students to pursue teaching as a career. Educational loans will be provided primarily to academically talented students, minority students, and students desiring to teach in remote locations or in shortage areas. Payback of the loans will be through teaching service. A total of $600,000 has been appropriated for the 1987-89 biennium to support this program.

Pennsylvania

In 1984-85 the State Department of Education awarded $4 million in grants to local districts for locally-developed efforts to improve instruction through training, to sponsor new programs developed by teachers, and to provide incentives for teachers. Nearly all of the state's 500 districts participated in the initial program, which received the same appropriation for 1985-86. (For 1986-87 the state legislature increased the funding to $7 million.) Sixty-seven of the districts developed incentive programs. Allocations were made after local districts submitted a written proposal for approval by the State Department of Education; funds were distributed according to a formula based on a pupil/teacher ratio.

With a change in the state administration, the scope of the program was modified for 1987-88. $4 million was provided to promote effective teaching. Districts have been awarded subsidy funding based upon a formula and can use the funds to support such programs as mentor teacher and continuing professional development. No funds have been provided for incentive pay.

During 1986-87, the governor presented a $5,000 award to the Teacher of the Year and $2,000 each to eight other finalists. While the Teacher of the Year and the finalists will be selected again for 1987-88, no cash awards will be made.

Rhode Island

While no statewide career ladder programs are being considered, the Rhode Island Department of Education is developing a performance-based assessment program, with a mentor teacher component as a part of the certification process. The Board of Regents of Elementary and Secondary Education has included $225,000 for this proposal in its current budget request, which will be addressed during the upcoming legislative session. These requested funds would support pilot projects in five districts. Additionally, legislation is being proposed by the State Department of Education to provide for the pilot study. Should the legislation and budget be passed during the session, the Department of Education is prepared to initiate a work group to develop the assessment criteria to be used in the pilots.

South Carolina

Three incentive programs—Teacher Incentive, Principal Incentive, and School Incentive—continue, according to 1984 legislation. Total funding for 1987-88 for the three incentive programs is about $17 million. All programs use student achievement as a major criterion for the awards.

The Teacher Incentive Program has expanded from a $2.2 million project in nine districts to a $12 million program that now involves 44 of the state's districts and 60 percent of the state's students (up from 40 percent during 1986-87). Funded on a per-pupil basis ($32.20 per pupil), 80 percent is for awards (from $2,000 to $3,000 per teacher) and 20 percent for administration of the program at the district level. The 1984 law called on districts to develop models—a bonus plan, a career ladder, and a campus individual plan. Districts then designed programs according to the models. Based on recent recommendations of advisory groups, including teachers and legislators, the career ladder model is being phased out. It was believed that the career ladder model, as it was being implemented, depended too much on documenting extra activities or work. Advisors called for more emphasis on rewarding teachers for top classroom performance and student achievement improvements, rather than on the extra pay for extra work. All models now have criteria weighted to emphasize performance and student achievement rather than other criteria such as attendance or additional duties.

A recent third-party evaluation of the Teacher Incentive Program recommended that the guidelines for the program be more specific; that more technical assistance be available to districts; that State Department of Education-conducted surveys include administrators; and that State Department staff and resources be expanded. The report noted that the application rate was not as high as anticipated, but said that was not unexpected given the fact that it was a performance-based pay system.

Further conclusions from the review were that: improvement of teacher evaluation had been a focus of the program; the initial efforts to use student achievement as one part of determining teacher performance were receiving positive comments; and there had been improvements in staff development. Negatives about the program, according to the report, were that the documentation of performance by teachers was too time consuming, and the concept of competition (about

20 percent of the teachers receive bonuses) was a problem. The State Department of Education and University of South Carolina have developed two technical manuals to help districts: one is on developing performance evaluation instruments; the other deals with using student achievement in teacher incentive systems.

A second effort is the School Incentive Award Program, now beginning its third year. One-fourth of the 248 schools in the state received $6.77 million in awards during 1986-87. Awards are based on schools meeting criteria that include student achievement gain and student and teacher attendance; the achievement gain must be met. Money is distributed to the school for instructional purposes and may be used for materials or equipment. Schools meeting all criteria received $54.79 per pupil. Schools also receive non-monetary awards, such as flags and certificates.

Schools are grouped into categories based on background of students and student achievement gains are calculated. A student's scores are tracked from one year to the next and grouped at the school level for analysis. This method means that this year's first-graders are not compared with this year's second-graders; rather, it is possible to determine students' progress. Schools that have student achievement above what is predicted receive awards. Funding for the program was reduced to $4 million for 1987-88. Six districts in which two-thirds of the schools received awards received an additional $3 per student. During 1986-87, vocational centers were eligible for awards if their sending schools met the student achievement criterion. The awards recognize the contribution of the vocational school in developing academic skills and motivating students.

The Principal Incentive Program is now in its second year of pilot-testing. Twenty-eight districts (481 principals representing about one-half of the state's principals) are participating this year, compared to nine districts (174 principals) during 1986-87. Funding this year is $1 million, an increase from $600,000 last year. Statewide implementation is scheduled for 1988-89.

The program rewards school principals who demonstrate superior performance on a statewide evaluation instrument and productivity, including student progress. Approximately 20 percent of a district's principals may receive an annual award of between $2,500 and $5,000. Three models are used—a management-by-results model; an extended evaluation model; and a combination model. In the first model, principals must receive superior evaluations and successfully complete predetermined objectives as determined by a district committee. In the extended evaluation, principals must receive a superior evaluation; additional information, such as teacher and parent surveys, and output data from each school, is used. All principals in the district are ranked; the top 20 percent receive the incentive bonus. In the last model, a superior evaluation is combined with additional evaluation procedures determined by a district incentive committee.

South Dakota

In 1985 the legislature enacted a career ladder for teachers and administrators, but implementation of the plan was blocked by a petition drive which, although not aimed at the career ladder, effectively thwarted the legislation of which it was a part. Originally, a three-level career ladder certification system would have been created, but that legislation was repealed by the 1986 legislature; provisions related to only the first level in the original ladder were retained in the 1986 law.

Tennessee

The 1987 legislature continued the Career Ladder program and increased the funding—from $80 million in 1985-86 to $96.5 million in 1987-88. $85 million is used for salary supplements and benefits; the remainder is used for development and administration costs. 1987-88 is the fourth year of implementation of the program that includes a three-rung ladder for teachers (plus counselors, librarians, and other instructional support personnel), supervisors, and principals. Salary supplements from $1,000 to $7,000 are paid to those named to the ladder. Presently, 39,000 educators are on the ladder, with 6,200 teachers and administrators at the upper levels. Seventy-five percent of all the state's teachers are on Level I; about 11 percent are at the upper levels. (Teachers with less than three years of experience are not eligible for the ladder.) Approximately 20 percent of those eligible are on the top two levels. Around three-fourths of those teachers who have applied and been evaluated have been named to the top two levels. Two thousand teachers and administrators have applied to become a part of the ladder in 1987-88.

The 1987 legislature made several changes in the program. Originally, the program was required for any teacher in Tennessee newly certified after July 1984. Now, career levels I, II, and III are optional for all teachers. The probationary and apprentice levels remain mandatory for beginning teachers (those with less than four years of experience). Two separate licensing/certification tracks were created—the optional career ladder certificate and the mandatory professional license that requires a one-year probationary and three-year apprentice status. Teachers are evaluated by the district during their first four years, and if they are successful, they receive a 10-year professional license. Teachers may voluntarily seek career level I, II, or III based on performance in the classroom. Career ladder certification has been extended from five to ten years. The legislature defeated proposals that included allowing staff development courses to be taken (in place of classroom evaluation) to move up on the career ladder and allowing all teachers, not just those on career levels I and II, to be eligible for summer work. Committees are currently studying alternative routes to reach the upper levels of the career ladder and extended contracts. A study is also underway that is surveying reactions to the program by the state's teachers. Recommendations are to be made before the next legislative session.

During 1987, field testing continues on the inclusion of student achievement and attitudes in evaluating the performance of teachers. Information is gathered through the dialogue with teachers and questionnaires completed by the teacher's students and principal. Work is also underway on developing assessment techniques for school psychologists and speech/language teachers.

Texas

The fourth year of the Texas Career Ladder Program is underway; total funding has increased. During the first and second years, district instruments were used to place teachers on career levels I and II—teachers at level II receive from $1,500 to $2,000 additional pay. During 1986-87, a statewide instrument was used for determining placement on career levels I and II. Beginning this year, teachers are eligible to move to career level III (based on the statewide evaluation procedures) and receive from $3,000 to $4,000 additional pay.

A governor-appointed task force and a panel appointed by the State Board of Education recommended several changes in the program and evaluation process. In March 1987, the State Board of Education revised the appraisal system. Changes included eliminating and combining some of the items in the appraisal process and on the professional growth plan.

In June, the legislature amended the original law to reduce the number of annual observations from four to two for teachers on career level II or higher whose last performance scores exceeded expectations. The legislation also allowed grade chairpersons to be observers of teachers in the same building. (The original bill did not allow teachers to appraise teachers in the same building.) The 1987 legislation also calls on the State Department of Education to study the use of student achievement in appraising teachers. A report is to be made to the legislature in 1989.

Career level III will be implemented this year. Criteria to move up to level III include advanced academic training (a master's degree or appropriate number of hours) and clearly outstanding teaching performance in the previous two or three years of teaching. Teachers who were placed on career level II in 1984-85 are now eligible for career level III. Decisions for moving teachers to level III are made by the district. The program is funded through state and local dollars. The state funding, which is based on average daily student attendance, has increased from $50 per student in 1986-87 to $70 in 1987-88.

Utah

1986-87 was the third year of implementation of the career ladder system in Utah. All of the 40 districts in the state participate in the program, which requires submitting to the State Board of Education a local plan meeting state criteria.

The system consists of two major dimensions—horizontal and vertical. Funding is provided for the horizontal dimension for additional paid non-teaching days beyond the regular school year. The law governing career ladders in Utah prohibits the expenditure of more than 50 percent of each disrict's allocation for the horizontal dimension. In 1986-87, 39.9 percent of the state appropriation—nearly $13.7 million, which does not include fringe benefits—was expended in this area.

The vertical dimension involves the advancement of certified instructional personnel on a career ladder based on effective teaching performance. This area includes performance bonuses (focusing on recognizing and rewarding teachers for excellence in the classroom); career ladders (a multi-level ladder with placement criteria, performance expectations, and a compensation schedule for placement on a level of the ladder); and job enlargement (extra pay for extra work, such as curriculum development and assisting beginning teachers). The law requires that at least 50 percent of a district's allocation be directed toward the vertical dimension. In 1986-87, 60.1 percent of the appropriated funds were budgeted for the vertical dimension.

The total appropriation for 1986-87 was $41 million, including benefits. The legislature provided the same level of funding in 1987-88, despite fiscal problems in the state. The recommendation from the State Board of Education is to increase funding for 1988-89.

Vermont

Currently, there is no discussion or action being taken toward enacting statewide performance-based incentive programs.

The Department of Education is in the very early stages of approaching such issues as alternative certification, peer evaluation of teachers for certification, improving working conditions, and increasing teacher salaries. It is anticipated that the State Board of Education will begin addressing these issues over the next few months and that funding to support a limited number of pilot projects may be sought during the next legislative session.

Three local districts are in some phase of implementing career ladder or incentive system pilot projects. All are supported through local funding.

Virginia

The Master Teacher and Pay-for-Performance programs, funded in 1984-86, underwent evaluation by outside consultants which indicated that, despite problems with communication and involvement of teachers and administrators, pay-for-performance plans can work. The State Board of Education has endorsed the concept, but no further action has taken place.

The Report of the Governor's Commission on Excellence in Education recommends that financial incentives should be provided to districts that develop ways to keep effective teachers in the classroom. Professional responsibilities and requirements for advancement are to be defined.

Washington

The 1985 legislature approved a Beginning Teachers Assistance Pilot Program and provided funding for 100 mentors to assist beginning teachers in 1985-86. During 1986-87, the number of teams (one mentor to one teacher) increased to nearly 700.

Approximately $1.5 million has been appropriated for each year of the 1987-89 biennium for what is now called the Teacher Assistance Program. Currently, 880 teams are being funded. Additionally, other educational personnel, including counselors, nurses, school psychologists, reading resource specialists, social workers, occupational and physical therapists, and communication disorder specialists, are now eligible to participate in the program.

West Virginia

The West Virginia Board of Education has established policy guidelines for the Distinguished Teacher Program. In 1985, statewide evaluation guidelines were established; districts implemented evaluation procedures in 1985-86. The purpose of the Distinguished Teacher Program is to reward and recognize outstanding teachers, to improve the status of teaching, and to encourage professional growth. The State Board of Education will establish a state program; districts can adopt the state model or develop their own. Teaching performance is to be the primary criteria for advancement; programs are voluntary; and a review committee, with a teacher majority, will determine eligibility for recognition as a distinguished teacher. The plan is for a one-year pilot project before full implementation. The program depends on funding from the legislature.

Wisconsin

In 1985-86, the Wisconsin State Department of Education issued guidelines and standards to be used in the development of local district proposals for teacher incentive pilot programs. These pilots could include awards, career ladder, or first-year assistance programs for beginning teachers. Funding of $1 million was provided for the initial two-year period with the possibility of an extension for those participating districts wishing to continue. Eight proposals, involving 35 to 40 local districts, were initially funded and are continuing their pilots this year with a one-year extension of funding at a level of $214,000.

No legislation relative to career ladders or teacher incentives is pending at this time. It is anticipated that legislation will be proposed to incorporate the first-year assistance program for beginning teachers into law during the 1989 legislative session.

Wyoming

Although there was some discussion in 1984 relative to the consideration of merit in teacher compensation, no statewide action has been taken. While local districts have the flexibility to initiate formal teacher improvement programs, it does not appear that any are currently developing such programs.

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